A Strategic Market Outlook for Regional US Ferrous Scrap to 2021

- Which US scrap regions are growing and which are facing depleting reservoirs?
- How will ferrous scrap prices change over time?
- What are the intra-regional scrap trade flows within the US, and what will this mean to scrap suppliers?
Future concerns for the US scrap market

Over the past few months, the over capacity of shredders within the US has reduced the price premium shredded scrap commands over HMS grades down from $30/tonne to around $15/tonne, at the time of writing. Meanwhile, the busheling price margin over shredded has returned to within its traditional range.

However, beyond these short-term considerations lies the fact that the US scrap industry is facing a crisis of profitability, quality requirements to best meet domestic steelmaker requirements and changes to the availability and price dynamics of alternative metallics. Over the next ten years, merger and acquisition activity will intensify as the internal landscape will also undergo significant changes in terms of trade flows, recovery and transaction prices.

What is the future outlook for the US ferrous scrap industry?

This new scrap report follows on from the highly successful US State-by-State Steel study (published in July 2013) that focused on steel consumption in the US between 1994 and 2021.

AMM Research has conducted a fully independent research study on the US scrap industry by product type out to 2021, which aims to bring never seen before market intelligence vital to the interests of both scrap buyers and sellers.

This brand new study is the most detailed and comprehensive examination of the US ferrous scrap market providing detailed analysis and data broken down for 14 key US regions.

Each US region is evaluated on a standalone basis to best understand historic, current and forecast supply and demand dynamics (1996-2021).
The study details the following in terms of providing analysis, data and forecasts (out to 2021) for the following:

US scrap consumption (including EAF, oxygen furnace, iron foundry and blast furnace enrichment)

US scrap recovery
- Revert
- Prompt
- Obsolete (including newly obsolete)

Scrap trade – Net inter-regional US trade by region

A detailed scrap reservoir model

A fully dynamic and “open-source” forecasting scrap market model to run your own “what if scenarios” to changing parameters

A comprehensive historic and forecast ferrous scrap prices database which includes:
- No1 Bundles
- No1 Bushelings
- Auto Shredded
- No1 Heavy

In the following areas:
- Birmingham, Alabama
- Chicago, Illinois
- Charlotte, North Carolina
- Cleveland, Ohio
- Detroit, Michigan
- Houston, Texas
- Philadelphia, Pennsylvania
- St Louis, Missouri

Key analysis of all US regional ferrous scrap markets

A key feature of this report is its regional focus on the ferrous scrap markets broken out by the following:
- Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Rhode Island, Vermont
- Pennsylvania
- Illinois
- Indiana
- Iowa, Kansas, Minnesota, Missouri, Nebraska, South Dakota, Wisconsin
- Michigan
- Ohio
- Delaware, Maryland, Virginia, West Virginia
- Florida, Georgia, North Carolina, South Carolina
- Alabama, Kentucky, Mississippi, Tennessee
- Arkansas, Louisiana, Oklahoma
- Texas
- Arizona, Colorado, Idaho, Utah
- California, Oregon, Washington

For each US region, the report provides analysis and data (1996-2021) for the following:
- Scrap consumption
- Scrap generation (split between revert (home), prompt and obsolete)
- Scrap recovery
- Scrap imports and exports
- Net interregional scrap trade
- Scrap reservoir – specifically designed to identify which areas have growing supply and which have nearly exhausted reservoirs

“Undeniably Metal Bulletin Research is an information provider throwing an objective light on often bifurcated information. Essential!”

Krista Van Bergen, SteelFORCE Asia NV
About AMM Research

AMM Research is the leading independent supplier of market intelligence and pricing to the North American metals industries and publisher of the widely-used reference prices for scrap. American Metal Market (AMM), was founded in 1882, over its long history has established itself as the unrivaled leader in metals news and pricing in North America. AMM and sister publication Metal Bulletin are part of the Euromoney Institutional Investor Plc.

AMM Research (known as Metal Bulletin Research outside the US) is the independent market research and consultancy arm. Utilizing our team of US consultants and economists based in Pittsburgh, Washington and Boston, AMM Research has conducted the most exhaustive and informative study on the US scrap industry available anywhere.

Biographers/authors of the US ferrous scrap study

B. Levich – Consultancy & Special Projects
Director of Metal Bulletin Research

Brian covers the global steel and raw material sectors in detail. He has written numerous major reports on the global steel, raw materials, and finished product industries and has done extensive consultancy and market research work for a number of major steel producers and consumers as well as for financial institutions.

A. Craig – Principal Consultant

Alexander is principal consultant with Metal Bulletin Research focusing on the global metals and mining industries. He has worked for both McKinsey & Company and Accenture. Craig studied economics at the University of Cambridge, where he took a First Class degree. He subsequently undertook postgraduate study at MIT in econometrics and public finance.

R. Egge – Principal Consultant

With over 18 years of experience as a strategic consultant for the global metals/mining industry, Mr Egge has worked at Arthur D. Little, Accenture and Deloitte. He has significant experience in helping metals and mining clients identify, quantify, prioritize and capture value creation opportunities. While at Arthur D Little he worked hand and hand with the C-suite of an integrated metals company in the United States to develop a business case for the development of raw material reserves. Russell has a degree in Materials and Metallurgical Engineering from the University of Michigan (Ann Arbor Michigan) and a Masters Science in International Management from Rensselaer Polytechnic Institute (Hartford Connecticut).
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